



FRANCE

MEDIA LANDSCAPE

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The image shows the flag of the Central African Republic waving on a flagpole against a cloudy sky. The flag consists of three horizontal stripes of green, white, and green, with a vertical red stripe in the center. A white diagonal stripe runs from the bottom left to the top right, bisecting the flag. A red banner with white text is overlaid on the left side of the image.

COUNTRY OVERVIEW

Country Overview

7TH LARGEST ECONOMY IN THE WORLD



CAPITAL
Paris

REGION
Europe

GDP PER CAPITA, PPP
\$49,620

GDP
\$2.73 trillion

POPULATION
67,248,926

AREA
643,801 SQ.KM

The World Bank classifies France as a wealthy, high-income nation.

The French economy is one of the world's largest and is a mixture of private enterprise and government involvement.

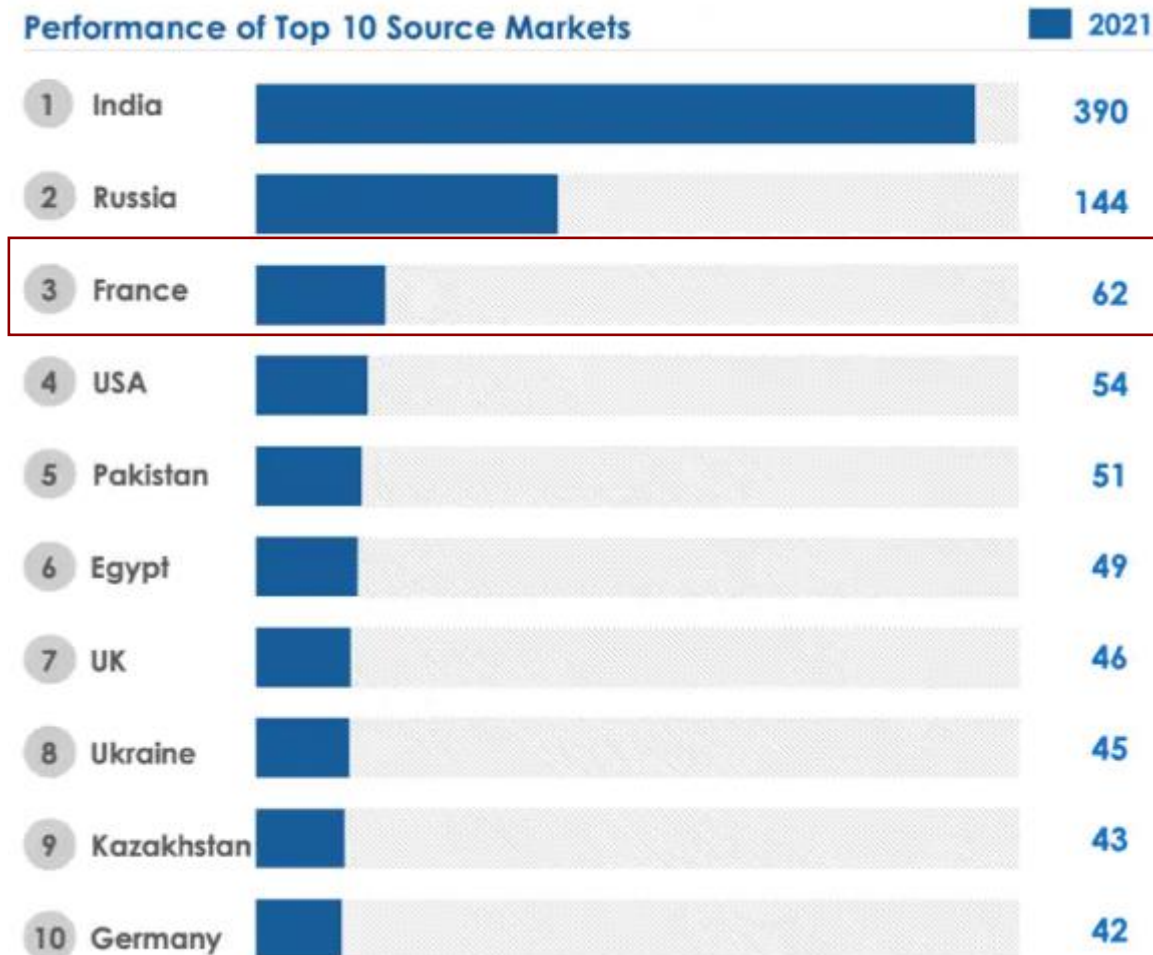
Tourism is a major contributor to the economy. Other important sectors include industry, agriculture, energy and defense.

A black and white photograph of a woman walking through a modern airport terminal. She is carrying a rolling suitcase and a backpack, and is looking down at a smartphone in her hand. The terminal has large glass windows and a polished floor that reflects the light. A red banner with white text is overlaid on the image.

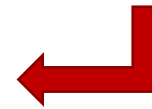
OUTBOUND TRAVEL INSIGHTS

Outbound Tourism Overview

APPROXIMATELY 62,000 FRENCH TOURISTS VISITED UAE IN THE 1ST QUARTER OF 2021



France is now the 3rd largest source market for UAE (April 2021)



For 45% of French people, the travel budget will remain unchanged in 2021



39% of French people say they are ready to travel outside Europe as soon as they are vaccinated.

TOP 10 SOURCE MARKETS FOR VISITORS TO DUBAI ('000 VISITORS JAN-APR 2021) Source: [DTCM](#)

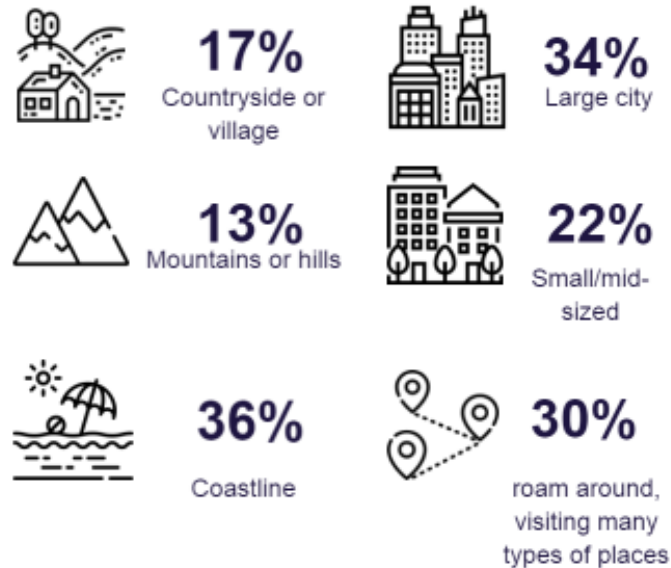
Outbound Tourism Overview

81% OF FRENCH PEOPLE WHO TRAVELED ABROAD WERE E-TOURISTS (PREPARED TRIPS ONLINE)

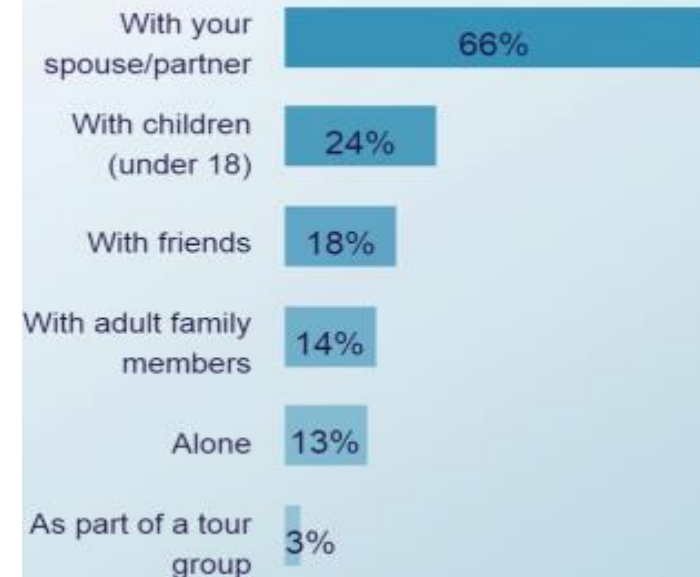
French Travel Sentiment During COVID-19



Destination types



Travel party



MEDIA LANDSCAPE

MEDIA

RADIO

MAGAZINES

INTERNET

TELEVISION

NEWSPAPERS

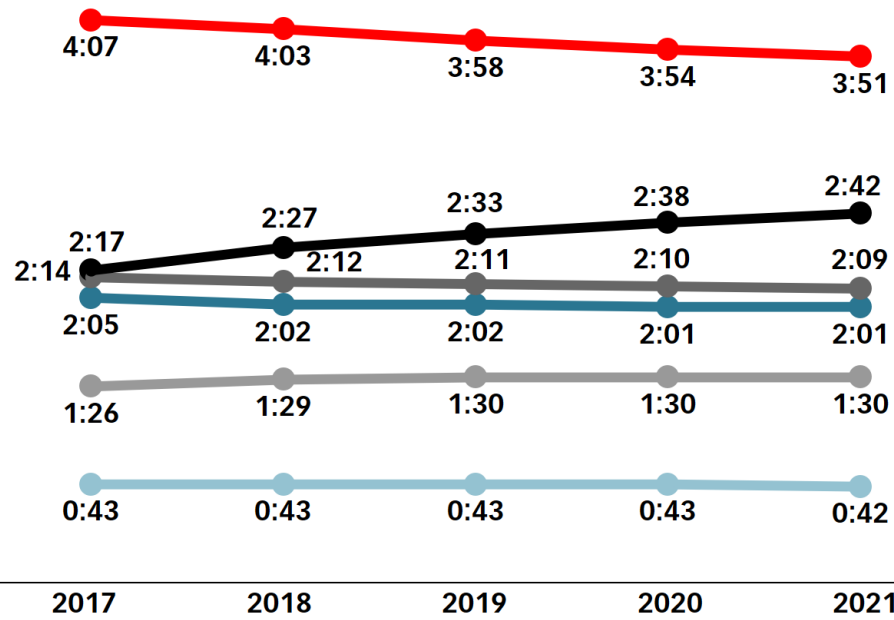


Media Consumption Overview

AVERAGE TIME SPENT WITH MEDIA IN FRANCE IS OVER 10 HOURS

Average Time Spent with Media by Users in France,
2017-2021

hrs:mins



■ TV* ■ Smartphone ■ Desktop/laptop**
■ Radio* ■ Tablet ■ Print*



TV is the strongest medium,



Digital accounts for 41% of
their total media time

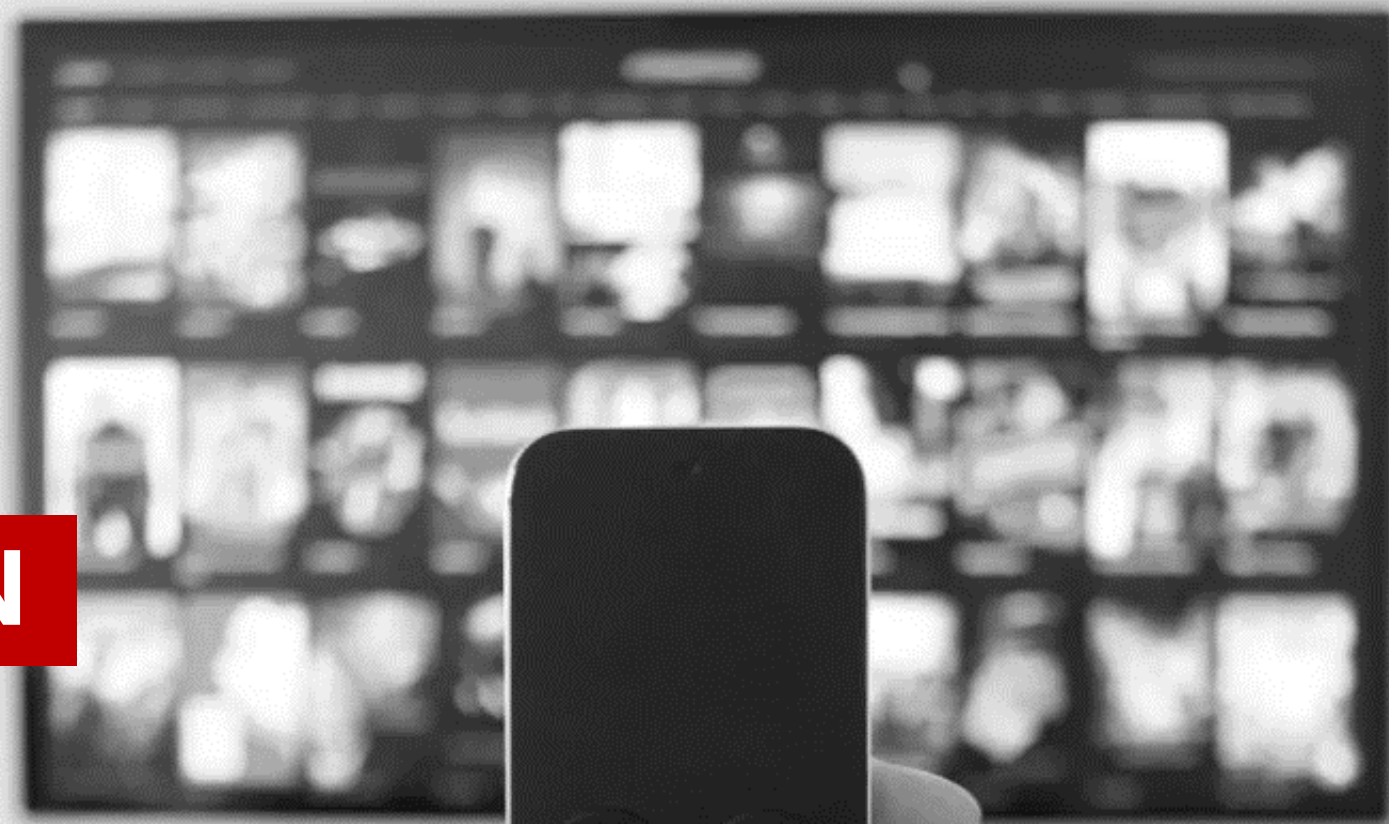


Although declining, radio
makes up more than 2 hours
of total media time.



Print boasts a loyal
readership over the years

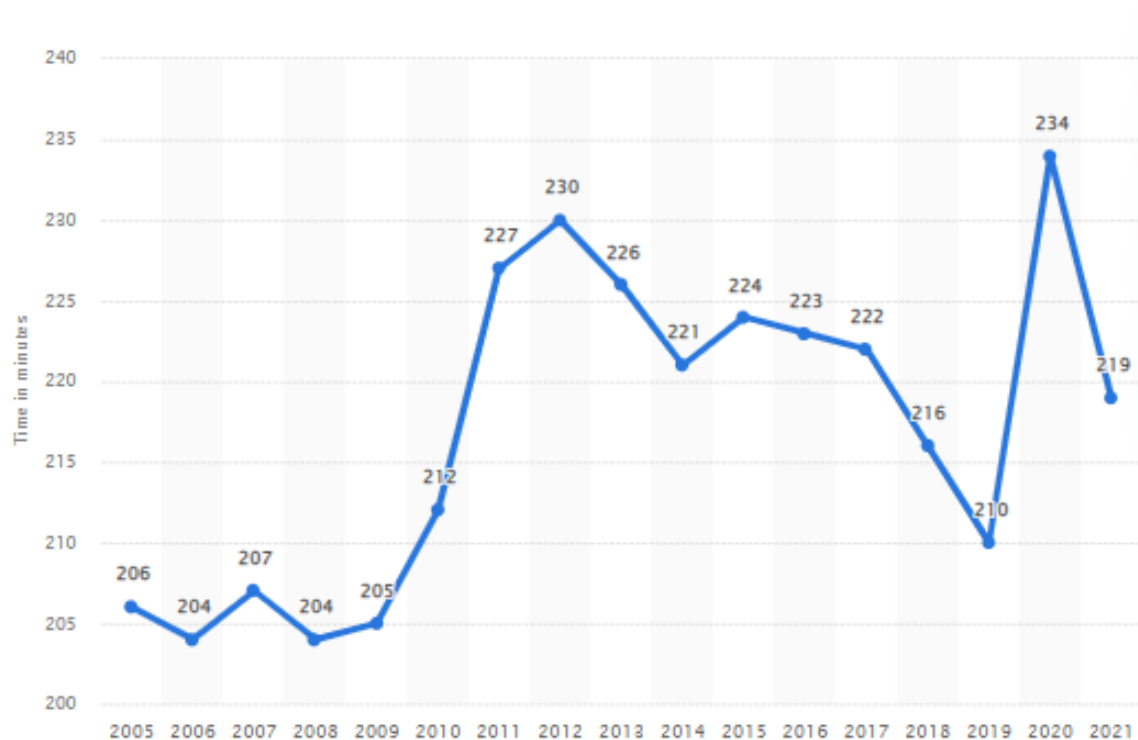
TELEVISION



Television

THE FRENCH STILL SPEND A LARGE PART OF THEIR DAY IN FRONT OF THE TV SET

Average television viewing time per day in France (2005 to 2021)



TV's daily viewing
is almost 4 hours
a day

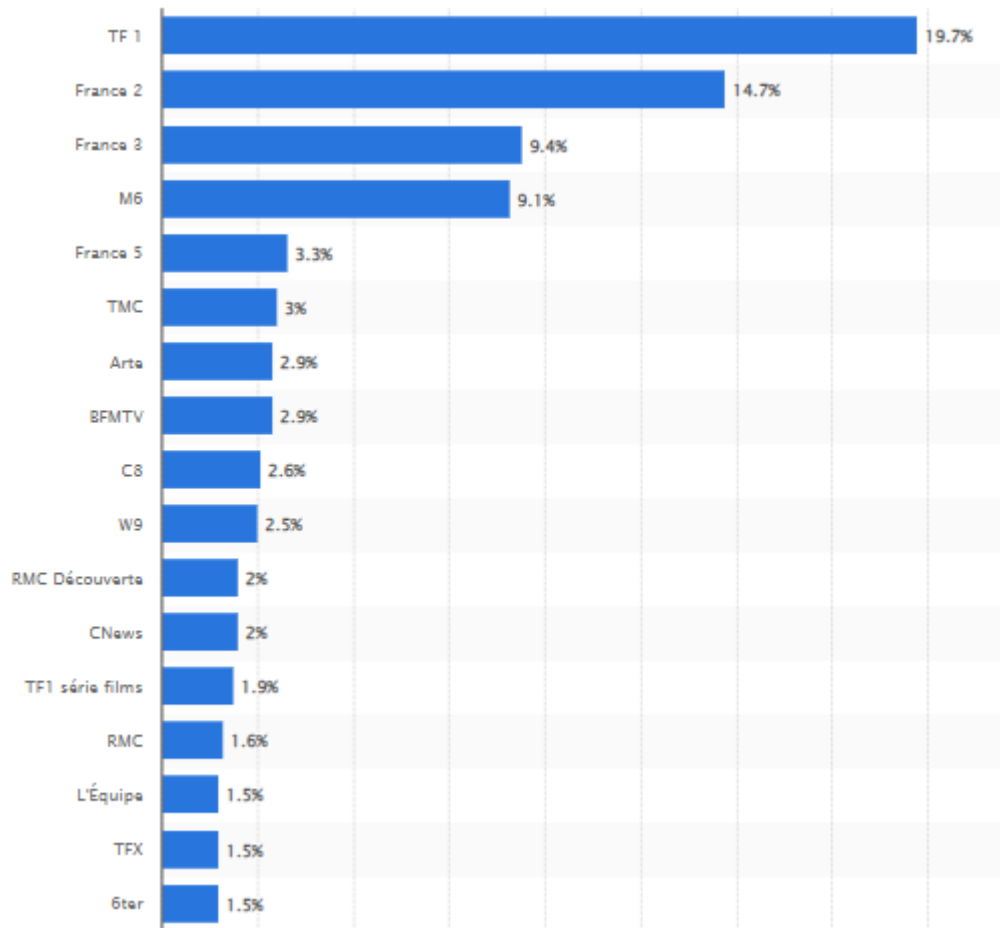
In 2020, 92 percent
of French
households were
equipped with a
television set.

Classic prime time
peak audience at
9:30pm that unites
more than 23
million viewers each
evening.

Television

TOP TV STATIONS (2021)

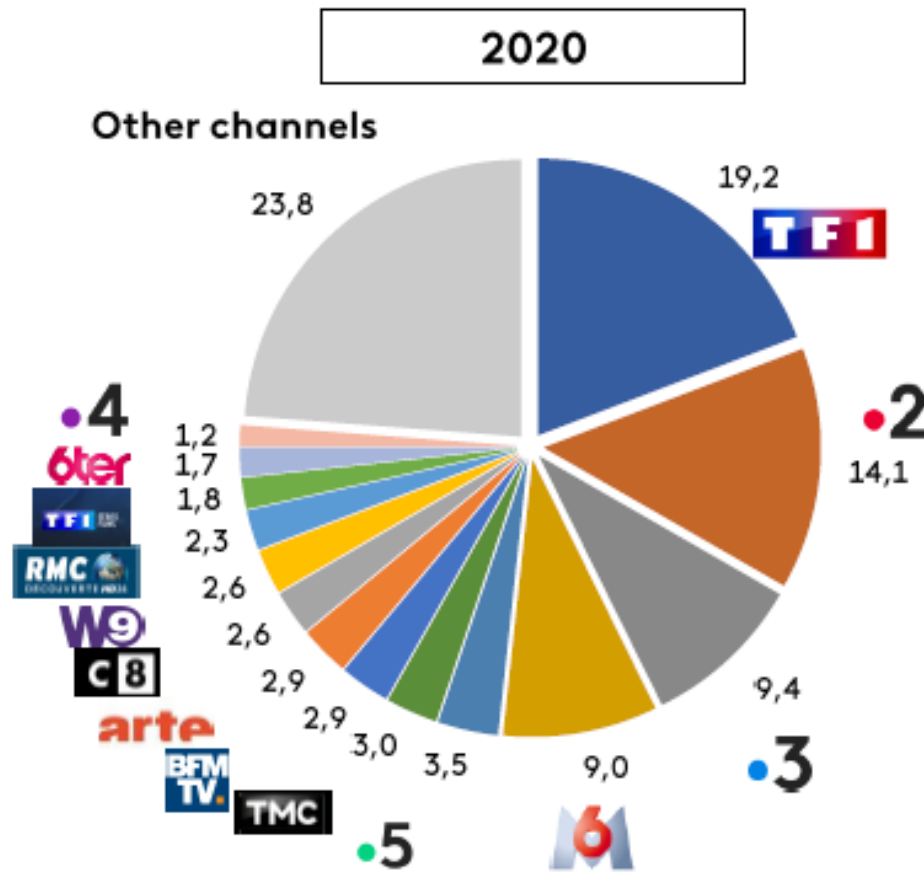
Audience distribution among the leading television channels in France in 2021



- As of 2021, the private national TV channel called TF1 was the leading television channel in France with a market share of 19.7 percent.
- France.tv accounts for nearly 30% of the TV viewing audience in France as a network.

Television – Impact of COVID-19

INCREASE IN TELEVISION VIEWING TIME WAS LARGELY DRIVEN BY LIVE TV



Pay TV and free-to-air operator Societe d'Edition de Canal Plus SA's C8 (FR) channel grew its audience share by 42.9% from July 2019 to March 9-15, 2020

46% of French internet users reported subscribing to a SVOD service during the lockdown in the country, compared with 36% last year.

French people needed to follow the news "in real time", as and when the health situation developed

France.tv Network includes France 2, France 3, France 4 and France 5, making it the top tv network during COVID-19 pandemic

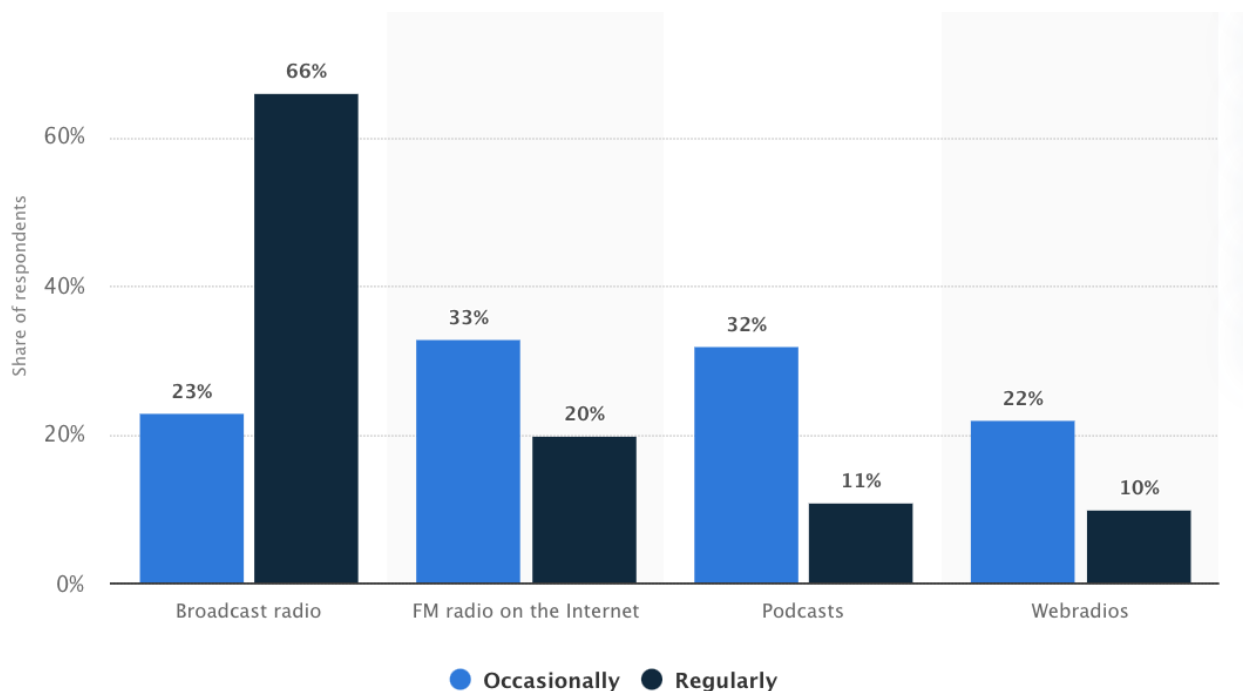
RADIO



Radio

RADIO PERSISTS DESPITE A CONTRACTION OF ITS AUDIENCE, PARTLY BY EMBRACING DIGITAL AUDIO

How often do you listen to radio?



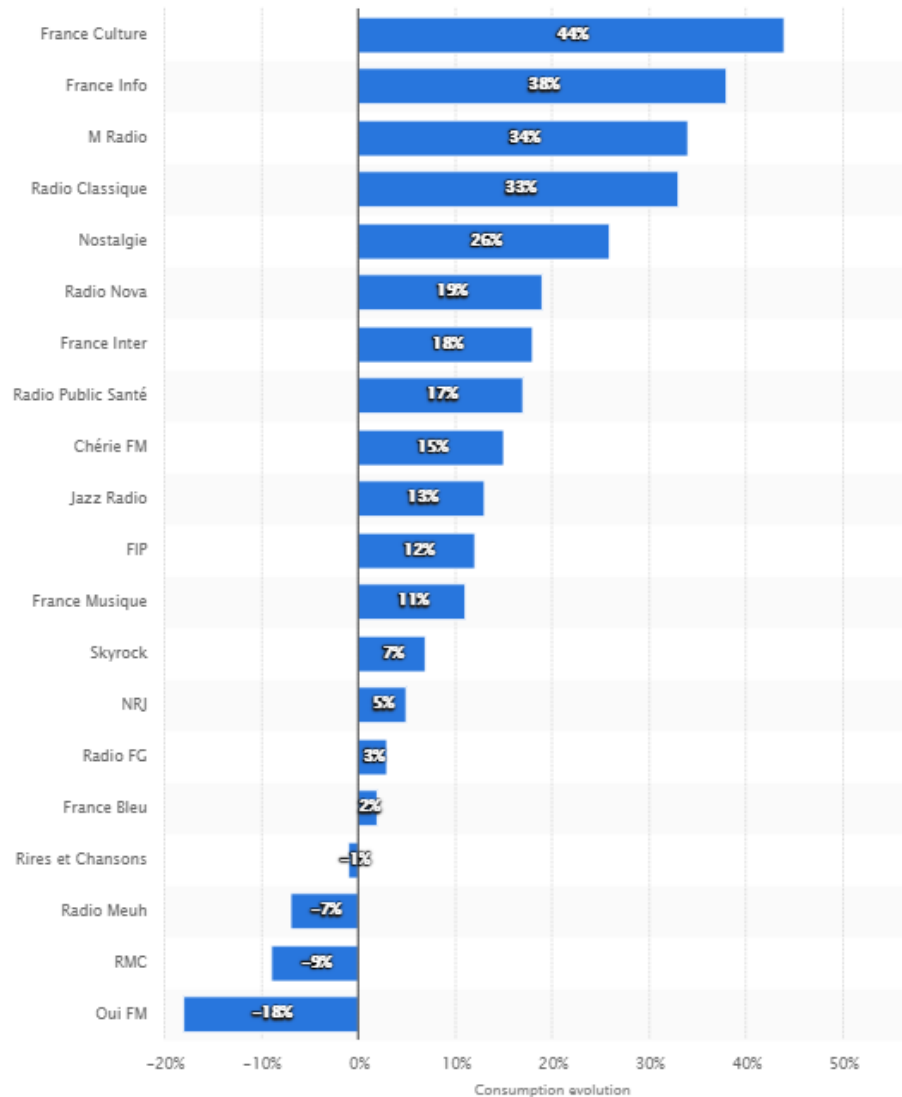
Every day **43.3 million** people in France listen to at least one radio channel.

On average, a radio listener spends between **2 hours and 10 minutes** with the medium.

However, radio is registering a slight decline of 1% - 2% YoY, but still maintains popular appeal, especially with older audiences.

Radio

TOP RADIO STATIONS

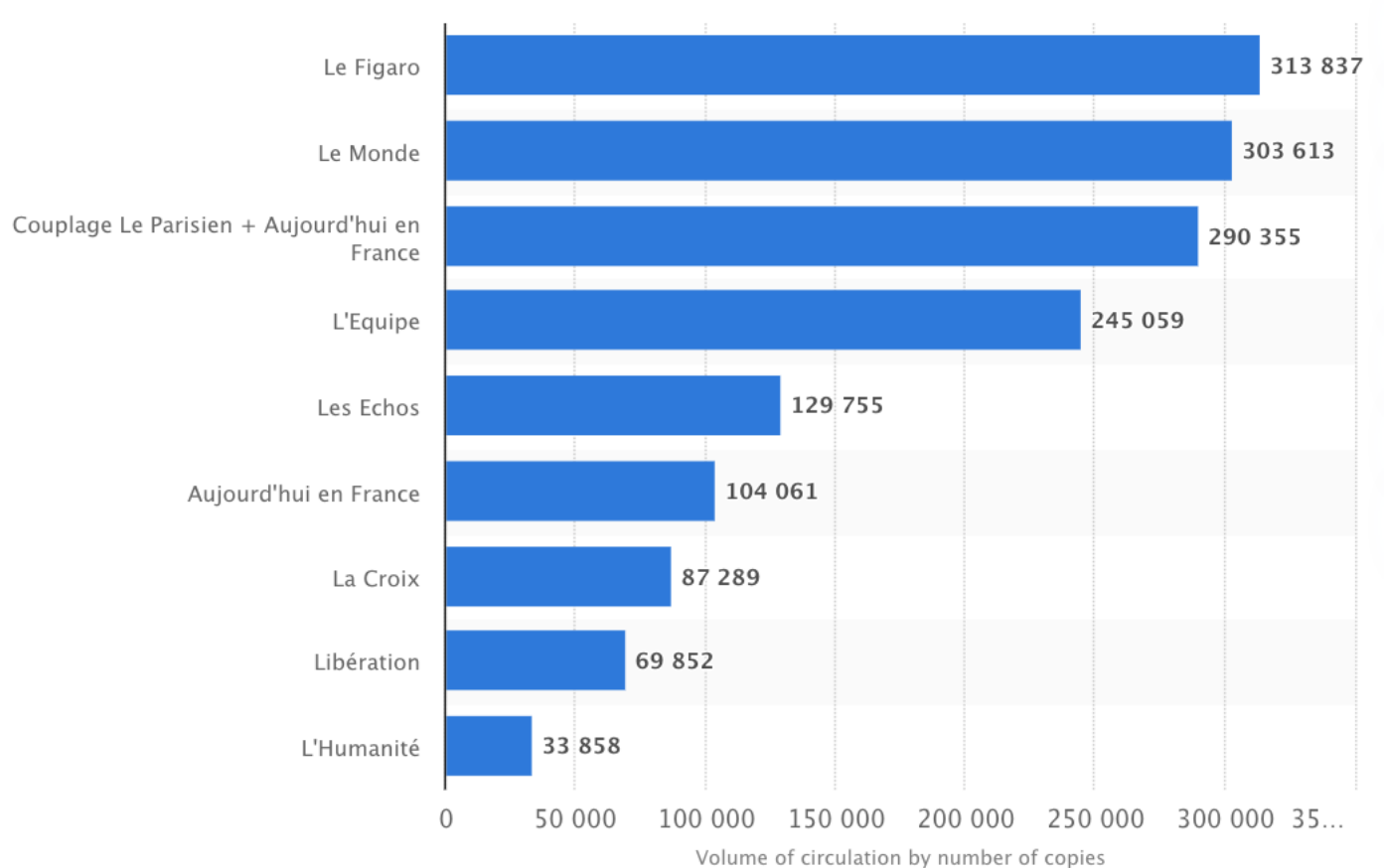


- The radio station France Culture recorded the most drastic increase with a consumption evolution of 44 percent in 2020, followed by France Info and M Radio respectively

A black and white photograph showing a stack of old newspapers and books. The newspapers are crumpled and aged, with some text visible on the top page. The books are also old, with some titles like 'Brand New Nonly' and 'STORIES MOSTLY' visible. The stack is resting on a dark, textured wooden surface. A red rectangular box with the word 'PRINT' in white capital letters is overlaid on the left side of the image.

PRINT

Paid circulation volume of national newspapers in France 2019



- Les Echos is the most popular financial newspaper and is equivalent to the Wall Street Journal in France
- Le Parisien doubled its digital subscribers in 2020, becoming the fastest growing newspaper online
- Le Figaro is one of the oldest daily national newspaper in France, covering topics such as news, business, sport, culture and lifestyle

OUT OF HOME



Halle St Pierre
Butte Montmartre

Métro

GEORG
HENSON

LOVE

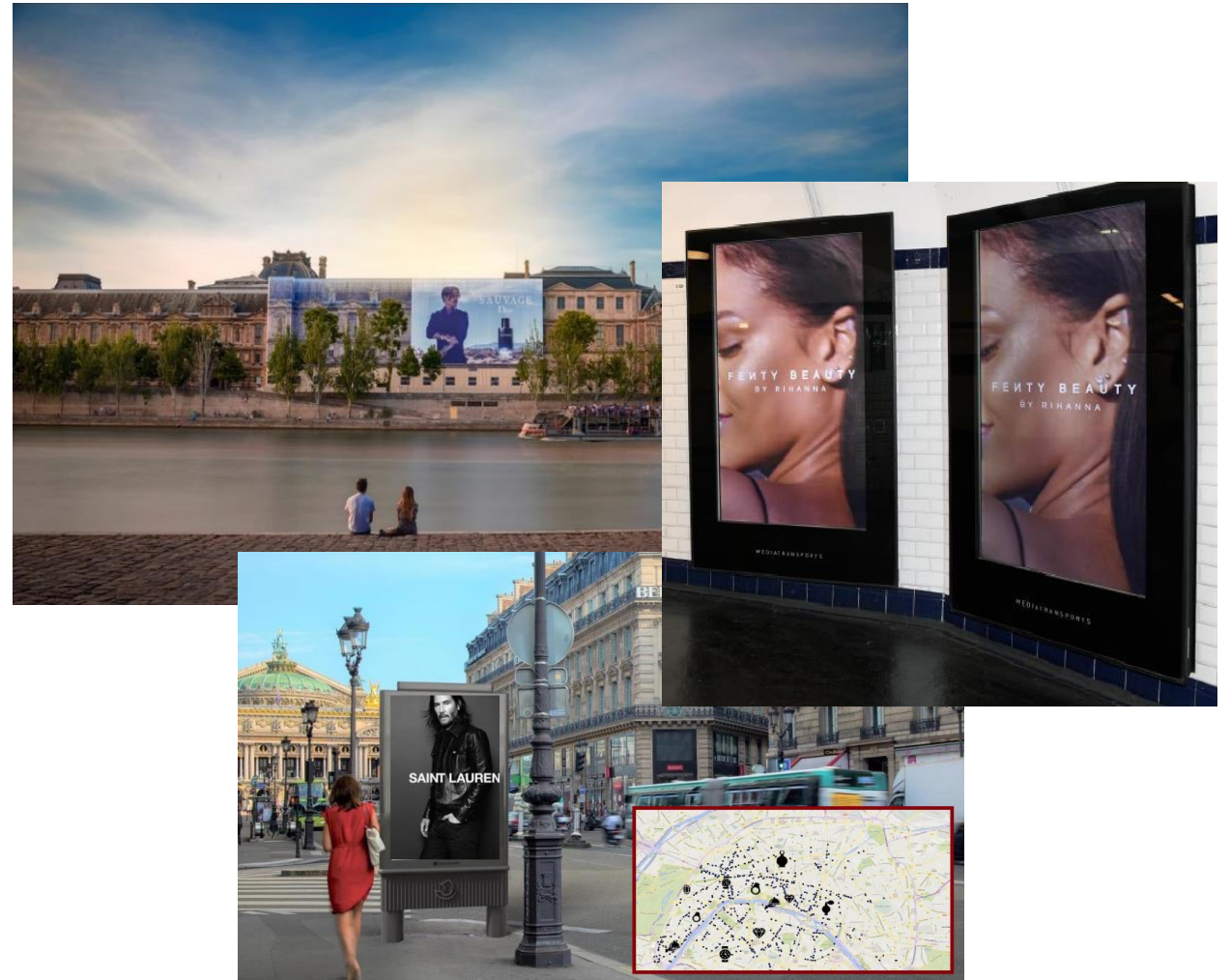
OOH

FASTEST GROWING MEDIA AFTER DIGITAL

Outdoor clearly benefits from its digital evolution.
It is the fastest growing media after digital.

This performance is the result of a transformation of
inventory toward more digitized panels, as well as the
good health of transit advertising

The increasing power of digitization has enabled
media owners to bring new solutions to advertisers,
especially those combining with ad mobile strategies.



OOH

OOH PORTFOLIO IN FRANCE

Digital billboards



City sites



Retail & POS



Transit



Street furniture



Airports



Key cities:

- Paris
- Lyon
- Marseille
- Bordeaux
- Lille
- Nice
- Nantes
- Toulon
- Orleans
- Toulouse
- Strasbourg
- Brest
- Montpellier
- Dijon



DIGITAL

Digital

THE COUNTRY HAS 59 MILLION ACTIVE INTERNET USERS



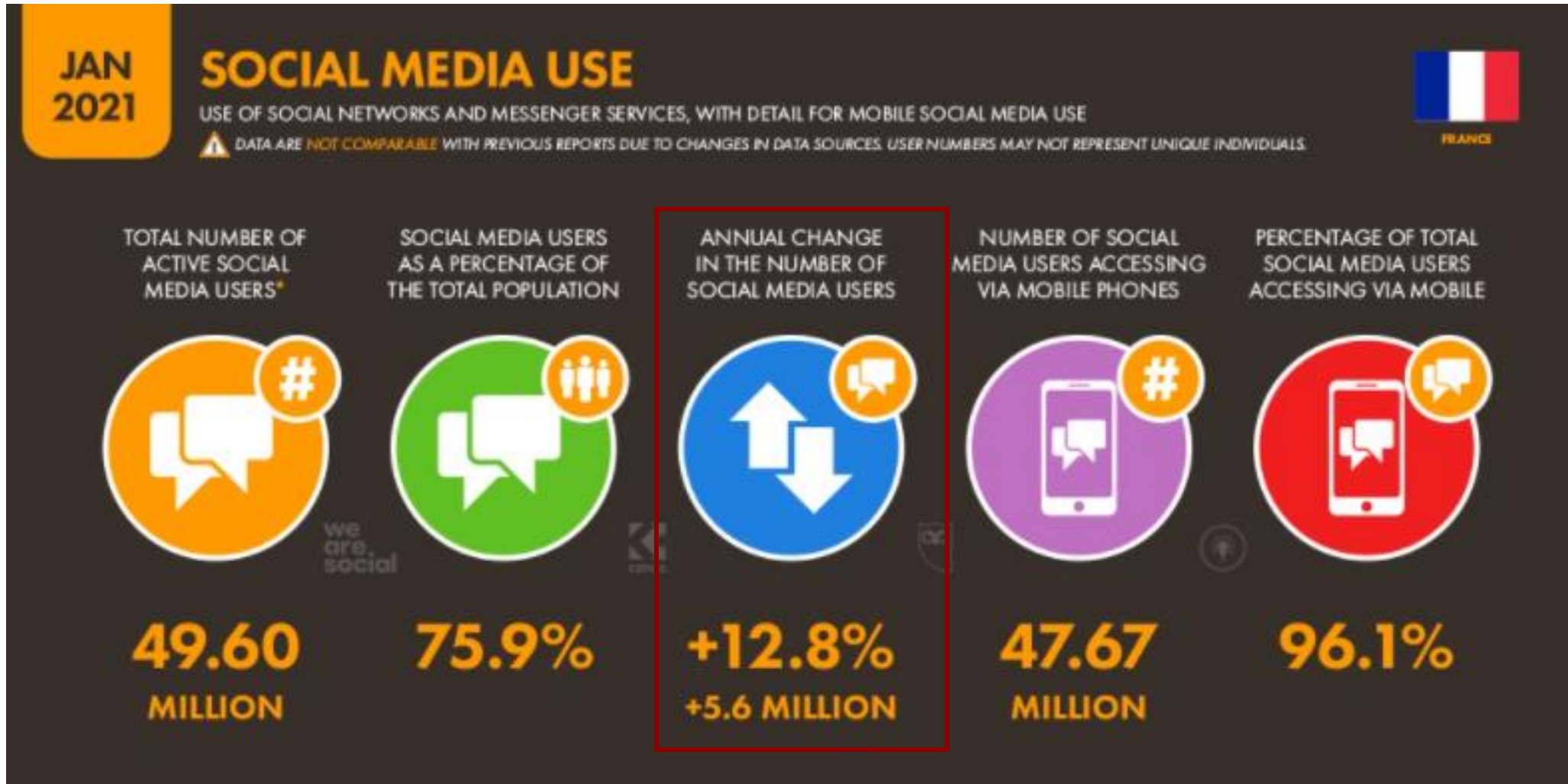
Digital

LARGE SHARE OF ONLINE TIME IS SPENT ON YOUTUBE



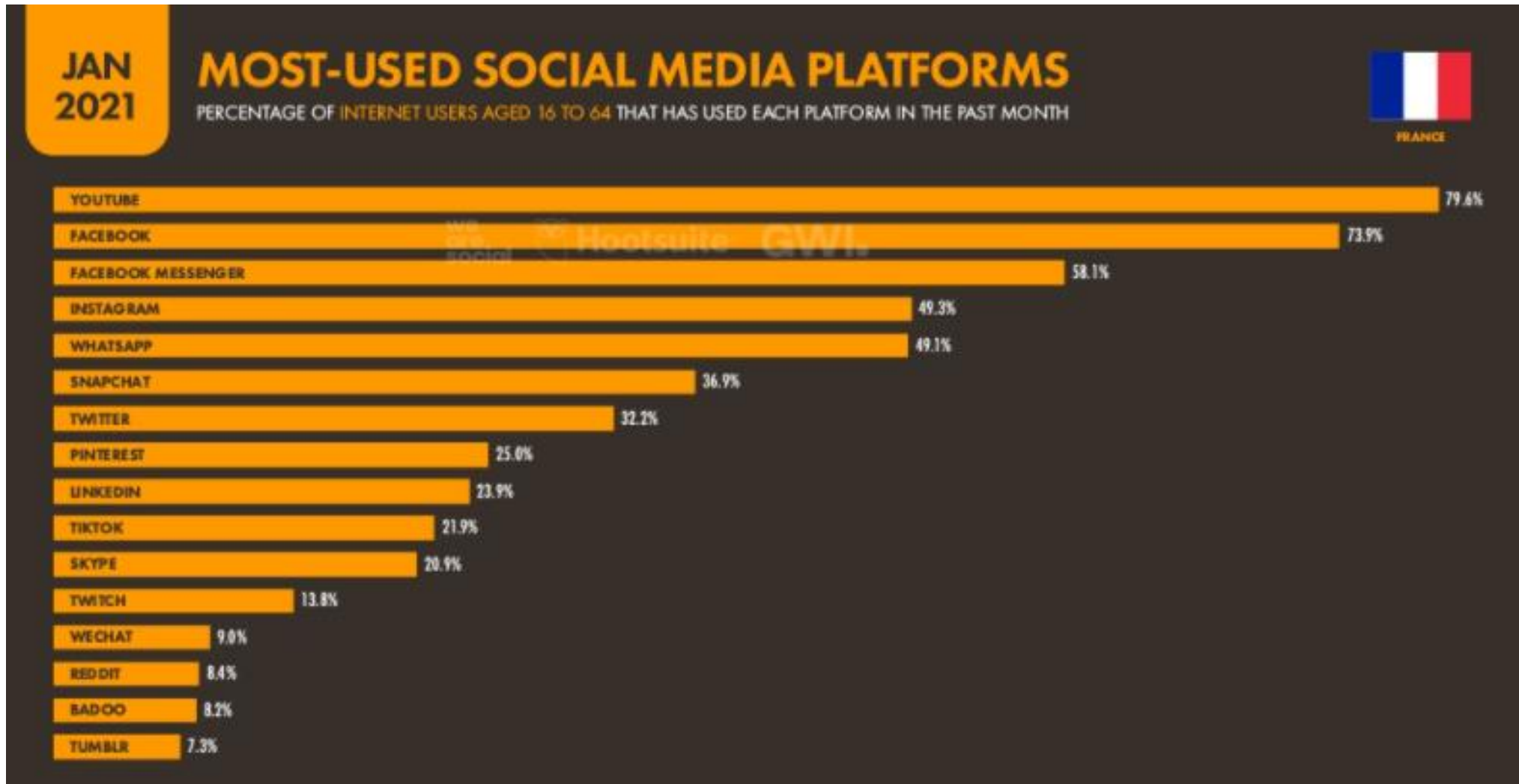
Digital

SOCIAL MEDIA USERS INCREASED BY 5.6 MILLION BETWEEN 2020 AND 2021



Digital

FACEBOOK AND INSTAGRAM ARE THE MOST USED SOCIAL NETWORKING SITES



APPENDIX

MEDIA TITLES



PRINT/ONLINE



KEY MEDIA- NEWSPAPER

Les Echos

Circulation: 133,429

Language: French

Total web visits: 14.61M

Average visit duration: 00:06:21

Les Echos is the first daily French financial newspaper, founded in 1908. Les Echos has a liberal stance and is published on weekdays. The paper publishes economical analyses by leading economists. In 2010, the coverage of Les Echos was expanded to cover such topics as innovations in science, technologies, green growth, medicine and health and skills concerning marketing and advertising, management, education, strategy and leadership, law and finance.

Le Parisien

Circulation: 180,854

Language: French

Total web visits: 11.53 million

Average visit duration: 09:05 min

Le Parisien is a French daily newspaper which covers international and national news. It features a special financial supplement every Monday and a weekend special supplement every Friday. Le Parisien also publishes a monthly women's magazine called Le Parisienne. The website and mobile applications enable readers to access complete news and an array of services anywhere, at any time.



KEY MEDIA- NEWSPAPER

Le Figaro

Circulation: 336,289

Language: French

Total web visits: 94.89M

Average visit duration: 00:04:51

Le Figaro was originally founded as a satire newspaper in 1826 and is France's oldest newspaper still in print. It has been printed every day since 1866 and is considered France's most important conservative paper. Le Figaro retains its leading position with 26.00 million readers per month as of 2020.

Le Monde

Circulation: 393,109

Language: French

Total web visits: 80.19M

Average visit duration: 00:11:51

Le Monde is a French daily afternoon newspaper. It is the main publication of Le Monde Group. It has had its own website since 19 December 1995 and is often the only French newspaper easily obtainable in non-French-speaking countries. Its audience has grown significantly to reach 22.44 million readers per month in 2020.



KEY MEDIA- MAGAZINE

Paris Match

Circulation: 568,115

Language: French

Total web visits: 11.04M

Average visit duration: 00:01:20

Paris Match is a French-language weekly news magazine. It covers major national and international news along with celebrity lifestyle features.

GEO

Circulation: 131,108

Language: French

Total web visits: 4.01M

Average visit duration: 00:01:25

GEO is a family of educational monthly magazines similar to the National Geographic magazine. It is known for its detailed reports and pictures.



KEY MEDIA- MAGAZINE

Monde Gourmand

Circulation: 89,000

Language: French

No website

Monde Gourmand is a food magazine that covers original recipes for iconic dishes from a different destination around the world.



Elle

Circulation: 382,875

Language: French

Total web visits: 49.15M

Average visit duration: 00:01:01

Elle is a worldwide lifestyle magazine of French origin that focuses on fashion, beauty, health and entertainment. It was founded in 1945. Elle is the world's largest fashion magazine, with 46 international editions in over 60 countries. The title means "she" or "her" in French. The magazine reaches over 69 million readers. The vast majority (82 percent) of Elle's audience are women between the ages of 18 and 49.



KEY MEDIA- MAGAZINE

Vogue

Circulation: 190,093

Language: French

Total web visits: 10.58M

Average visit duration: 00:01:55

Vogue is an American monthly fashion and lifestyle magazine that covers many topics, including fashion, beauty, culture, living, and runway. The French edition of Vogue magazine, Vogue Paris, is a fashion magazine that has been published since 1920. The magazine targets an upscale audience.

Marie Claire

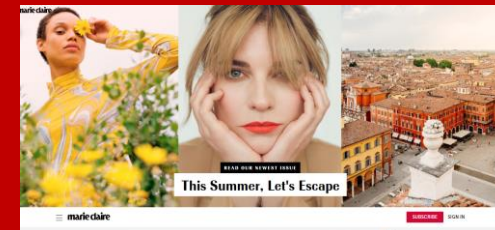
Circulation: 432,315

Language: French

Total web visits: 16.09M

Average visit duration: 00:00:47

Marie Claire is a French-British international monthly magazine first published in France in 1937, followed by the United Kingdom in 1941. Since then, various editions are published in many countries and languages. The feature editions focuses on women around the world and several global issues. Marie Claire magazine also covers health, beauty, and fashion topics.



KEY MEDIA- MAGAZINE

L'Officiel

Circulation: 101,719

Language: French

Total web visits: 94.95K

Average visit duration: 00:00:23

L'Officiel is a French fashion magazine. It has been published in Paris since 1921 and targets upper-income, educated women aged from 25 to 49. A men's edition of L'Officiel, L'Officiel Hommes, and many foreign editions are also published.

Madame Figaro

Circulation: 422,851

Language: French

Total web visits: 5.66M

Average visit duration: 00:03:28

Madame Figaro is a French magazine supplement to the Saturday edition of the daily newspaper Le Figaro, focusing on and catering to women.



KEY MEDIA- MAGAZINE

Notre Temps

Circulation: 707,703

Language: French

Total web visits: 4.56M

Average visit duration: 00:04:55

Notre Temps (meaning Our Time in English) is a French language monthly lifestyle magazine published in Paris, France. The target audience of Notre Temps is people aged between 50 and 64 years. The magazine avoids using such common words as "golden age" and "aged" when referring to its readers. Instead, it refers them using the phrase "people of leisure".

Le Figaro Magazine

Circulation: 408,361

Language: French

Total web visits: 94.89M

Average visit duration: 00:04:51

Le Figaro Magazine is a French language weekly news magazine published in Paris, France. The magazine is the weekly supplement of the daily newspaper Le Figaro. It provides articles on news about political events and current affairs. The weekly also features articles concerning art, music and literature.



Television



KEY MEDIA

France TV Network - France 2

Avg. Weekly Viewers (000'): 42,142



France 2 is a French public national television channel. It is part of the state-owned France Télévisions group, along with France 3, France 4, and France 5. France 2 offers a wide variety of programs for all audiences. It is channel providing news, entertainment and covering sports events.

France TV Network - France 3

Avg. Weekly Viewers (000'): 39,690



France 3 is a French free-to-air public television channel and part of the France Télévisions group. It is made up of a network of regional television services providing daily news programming and around ten hours of entertainment and cultural programming produced for and about the regions each week.

France TV Network - France 4

Avg. Weekly Viewers (000'): 28,220



France 4 is a French free-to-air public television channel and part of the France Télévisions group, focused on children's programming and sport.

• 2

• 3

• 4

KEY MEDIA

France TV Network - France 5

Avg. Weekly Viewers (000'): 34,403

France 5 is a French free-to-air public television channel, part of the France Télévisions group. Principally featuring educational programming, it almost exclusively concentrates on factual programming, documentaries, and discussions.

BFM TV

Avg. Weekly Viewers (000'): 10,000

BFM TV is a 24-hour rolling news and weather channel based in France and available globally via digital, cable and satellite television. It is the country's most-watched news channel.

TF1

Avg. Weekly Viewers (000'): 44,068

TF1 is a French free-to-air television channel owned by TF1 Group. It offers programming in news, entertainment, drama, sport, cinema, kids TV, magazines and documentaries



KEY MEDIA

TMC

Avg. Weekly Viewers (000'): 34,069

TMC is a Franco-Monégasque general entertainment television channel, owned by the French media holding company Groupe TF1. It attracts mainly a young audience (25-49 years old). Its editorial line is around entertainment, with shows like Quotidien (France's no.1 chat show), Burger Quiz (hosted by Alain Chabat), live concerts and one man shows. It also features movies.



TFX

Avg. Weekly Viewers (000'): 31,569

TFX is a French free television network. It is a subsidiary of TF1 Group. TFX is the go-to channel for millennials. Its editorial success is built on its first-run reality TV, real entertainment around themes that speak to the target young audience (fashion, tattoos), generational series like Dragon Ball Super and Gossip Girl, and movies.



RADIO



KEY MEDIA

Virgin Radio

Frequency: 103.5 MHz

Language: French

Virgin Radio is a French private musical category D radio (category C for local stations). Virgin Radio broadcasts singles and songs by electro-rock & pop artists. Classified in the category of contemporary adult radios, and primarily targets young adults.



Europe 1

Frequency: 104.7 MHz

Language: French

Europe 1, is a privately owned radio station created in 1955. Owned and operated by Lagardère Active. It is one of the leading radio broadcasting stations in France and its programs can be received throughout the country. The station delivers media news, daily life and health, history, cinema, music.



RFM

Frequency: 103.9 MHz

Language: French

RFM is a French radio station owned by Lagardère Active, based in Paris and created in 1981. It offers the best of French and International Oldies from the 60s to the 90s



KEY MEDIA

France Bleu

Frequency: 107.1 MHz

Language: French

France Bleu is a network of local and regional radio stations in France, part of the national public broadcasting group Radio France. The network has a public service mission to serve local audiences and provides local news and content from each of its forty-four stations.

France Culture

Frequency: 93.5 MHz

Language: French

France Culture is a French public radio channel and part of Radio France. Its programming encompasses a wide variety of features on historical, philosophical, sociopolitical, and scientific themes (including debates, discussions, and documentaries), as well as literary readings, radio plays, and experimental productions.

France Inter

Frequency: 94.3 MHz

Language: French

France Inter is a major French public radio channel and part of Radio France. It is a "generalist" station, aiming to provide a wide national audience with a full service of news and spoken-word programming, both serious and entertaining, liberally punctuated with an eclectic mix of music.



KEY MEDIA

Mouv'

Frequency: 92.1 MHz

Language: French

Mouv' (formerly Le Mouv') is a French youth-oriented radio station which began broadcasting on 17 June 1997. As part of Radio France, it is a public radio station. The station primarily plays youth-oriented music, centered on urban music and hip hop.

France Musique

Frequency: 91.7 MHz

Language: French

France Musique is a French national public radio channel owned and operated by Radio France. It is devoted to the broadcasting of music, both live and recorded, with particular emphasis on classical music and jazz.

Jazz Radio

Frequency: 97.3 MHz (Lyon)

Language: French

Jazz Radio (formerly Fréquence Jazz) is a French radio station dedicated to jazz and soul that started in 1996. Jazz Radio is based in Lyon, France.



KEY MEDIA

M Radio

Frequency: 102.7 MHz

Language: French

M Radio (originally known as MFM Radio) is a radio station, based at Lyon (France) and created in 1981. M is dedicated to only French songs like its local competitor in Île-de-France, Chante France.



Radio Classique

Frequency: 101.1 MHz

Language: French

Radio Classique is a French commercial radio created in 1983 that broadcasts mainly classical music. Its programmes also contain segments of economic and political news.



BFM Business

Frequency: 96.4 MHz

Language: French

BFM Business (called BFM for Business FM until April 2009 and BFM Radio until November 2010) is France's first business news channel. It's also the most-listened to business news radio station in this country.



KEY MEDIA

Nostalgie

Frequency: 90.4 MHz

Language: French

Nostalgie is a popular French radio station broadcasting on FM, mostly playing pre-2000s songs with 76% of them coming from the 1980s. Nostalgie is part of the NRJ Group..



Radio Nova

Frequency: 101.5 MHz

Language: French

Radio Nova is a radio station broadcast from Paris, created in 1981 by Jean-François Bizot. Its playlist is characterized by non-mainstream or underground artists of various music genres, such as electro, new wave, reggae, jazz, hip hop and world music.



Chérie FM

Frequency: 91.3 MHz

Language: French

Chérie FM is a French radio station created in 1987 and belongs to the NRJ Group. It offers adult contemporary music to its listeners.



KEY MEDIA

RTL

Frequency: 93.5 MHz

Language: French

RTL, formerly Radio Luxembourg, is a French commercial radio network owned by the RTL Group. Founded in 1933 as Radio Luxembourg, the station's name was changed to RTL in 1966. It broadcast from outside France until 1981, because only public stations had been allowed until then. It is a general-interest, news, talk and music station, broadcasting nationally.

Skyrock

Frequency: 96 MHz

Language: French

Skyrock is a French radio station based in Paris created in 1986, and is mainly dedicated to mainstream rap music and R&B.

NRJ

Frequency: 100.3 MHz

Language: French

NRJ is a private French radio station created by Jean-Paul Baudecroux and Max Guazzini in June 1981. The station focuses on current chart hits throughout the day and electronic dance music during some weekend late night hours. Talk programs are based every evening except Saturday.



KEY MEDIA

France Info

Frequency: 105.5 MHz

Language: French

France Info is a radio network operated by the French public service radio broadcaster Radio France. It provides continuous live news and information.

franceinfo:

Let's discuss

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